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Imported paper is playing a larger role in the merchant's product mix.

Cover Photo
International Paper Company

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UNIJAX LAUNCHES PRIVATE BRAND PRINTING PAPERS

Months of rumors were dispelled recently when Unijax, Inc., a major distributor of printing papers and graphic arts supplies, unveiled for the first time publicly a revolutionary plan to break away from some of the traditional mill distribution methods. Designated "Project Neptune," the plan calls for the introduction of Unijax specified and produced lines named along a nautical theme (Main Sail, Keel Master, Astro Lux, etc.) that will replace previous mill regulated products.

"Our company has been a driving force in leadership and innovation for nearly a century," stated Unijax marketing vice president John Fox. "Methods and systems used by many of our competitors were first created and developed by Unijax. Our customers know that being a 'me-too' is not our style, and never will be. Our objective has always been to provide the best products available at an economical cost. A responsibility we hold dear is to protect the trust and confidence our customers have in Unijax leadership."

"For that reason over the last two years, under the confidential code name 'Project Neptune,' we have analyzed many products of mill suppliers we represent in consideration of the ever changing and highly competitive printing marketplace. We arrived at the conclusion that Unijax should introduce and distribute a line of our own carefully selected paper and grahic arts products manufactured to our own strict specification, offering our customers top quality at competitive pricing." Upon completion of the analysis phase of "Project Neptune" last February, according to Fox, it was determined by Unijax management that a planned, controlled, phaseout of certain mill's products and the corresponding introduction of new product replacements in private label and mill branded, should begin immediately.

Programs such as the introduction of Keel Master and Main Sail Offset Enamel and Cover papers were first tested in selected key markets during 1983 and 1984. These are soon to be introduced in all markets. "Other products," stated Fox, "needed to complete the project are scheduled for introduction during the first quarter of 1985. These will include a premium gloss enamel text with matching cover in three versatile weights. A superior line of cast coated C-1-S litho and cast coated C-1-S cover in .008, .010, and .012, including tints. Other products are still in development and will be announced as they become ready for market introduction , but all are planned for completion by the 'Project Neptune' target date of April 1, 1985."

Fox commented that "Neptune" was part of a new, aggressive marketing position for Unijax in the printing and graphic arts marketplace. "This is only the beginning of things to come," continued Fox, "for Unijax and the printing industry. Two years ago, we introduced CopySaver, a premium grade copy paper, that has taken the market by storm. In 1984 alone, CopySaver copier paper gained a 14% share of that market. Testing is now complete on a commodity grade copy paper under the DigiCopy label. This paper will be less bright, but have the same qualities, and carry the same unique guarantee our customers have accepted and learned to expect." DigiCopy is set for system-wide introduction during the second quarter of 1985.

This is only the beginning of things to come...

A line of computer paper, as well as toner and developers for the copier market, will also be introduced. Papers such as Uni-Mate Pressure Sensitive, NCR Paper Brand of Carbonless, fancy finished text and covers, premium sulphite and rag content writings, are all among a select group of specialty papers scheduled for emphasis.

A centralized group purchasing plan coupled with a unique distribution system will revolutionize the Unijax graphic arts supplies and equipment division. Many of these graphic products will be marketed under a private label. One such product with testing completed is the CopySaver Two-sided Negative Plates for the duplicator/offset press. All printers participating in testing the CopySaver Plate line gave very high marks.

"Our CopySaver Negative Plates are now ready for full distribution. Other litho supply product lines are in the final testing phase to be formally introduced next month," said Mr. Fox.

He concluded by stating: "The most difficult factor in the overall 'Neptune' project was the need to keep most of the development under wraps, allowing for proper testing of new products while not disrupting the supply of products to major customers from those products identified for elimination.

"With the rumors running rampant, especially in the face of our decision to temporarily discontinue paper and graphic arts supplies in Atlanta, I wanted to let our customers, and we must add," Mr. Fox stressed, "our competition know, that with the Unijax aggressive approach to 'Project Neptune,' we will continue to be the leader in innovative distribution and supplier of premium quality products at an affordable cost."

Present Unijax distribution of printing products consists of twenty-seven branches servicing customers in fifteen states. In addition to private label products, Unijax continues to distribute top quality products from the most prominent paper mills and manufacturers of litho supplies and equipment in America. Among these are Appleton, Agfa-Gevaert, Beveridge, Azoplate, Cedartown, Baumfolder, Central, General Photo Products, Crane, Inmont, Gilbert, Kendall, Hammermill, Kodak, Howard, 3M, Lincoln, Michael Business Machines, Nashua, Nuarc, Nekoosa, Reeves, Olin, Sandmar, Scott, Shade, Townsend T-51, Valentine, Varn, VGC, S.D. Warren, Williamhouse, Baseline, Miami Papers, GTI, Fraser, Linweave, Union Camp, Glatfelter, Wausau, Plainwell, Watervliet, among others.

Unijax is a wholly owned subsidiary of IU, a diversified service company with major interests in transportation, environmental, agribusiness as well as distribution.

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ROCKFORD WHOLESALE PAPER COMPANY JOINS NPTA

Congratulations and welcome aboard to Rockford Wholesale Paper Company. The company was established in 1919 and operates a 20,000 square foot warehouse at 611-613 Chestnut in Rockford, IL.

The industrial distribution company has 11 employees. The president of the organization is Mark A. Sullivan.

BUTLER PAPER ANNOUNCES NATIONAL NAME CHANGE PROGRAM

F.G. Walker, president of Butler Paper Company, announced that the company's divisions that are not already operating as Butler Paper have taken the Butler name in February. Butler Paper is one of the nation's largest distributors of business and fine printing papers, with full-service distribution centers in over 60 U.S. cities. Eighteen locations have been affected by the name change.

Much of Butler Paper's growth over the last several years has taken place through acquisition, and the companies that joined the organization have continued to do business under their own names. Commented Walker, "Our philosophy has always been one of decentralized management, with each division having enough autonomy to be able to serve its own market effectively. This name change does not reflect any move away from that philosophy." At the same time, he noted, a single national identity has become desirable. "Having all of our locations united under the Butler name will allow each one to capitalize on the company's growing visibility.

There are five names that changed to Butler Paper in February: Consolidated Marketing Inc., Barton Duer & Koch Paper, Triquet Paper, Beene Paper, and Lone Star Paper. The largest group involves Consolidated Marketing Inc., which joined the Butler organization in 1982. CMI distribution centers are located in Alexandria, Baton Rouge, Lafayette, Monroe, New Orleans, and Shreveport, Louisiana; Little Rock and Fort Smith, Arkansas; and Lufkin, Longview, Tyler and Texarkana, Texas.

Barton, Duer & Koch Paper, with distribution centers in Washington, D.C. and Baltimore, Maryland, also became part of Butler in 1982, followed by the Triquet Paper Company (Lansing, Michigan) in 1983. Beene Paper (Tulsa, Oklahoma) was added in 1972, and Lone Star Paper (Austin and San Antonio, Texas) in 1974.

The only exception to the name change program will be Chatfield Paper, located in North Haven, Connecticut. Chatfield. with branch offices in Springfield, Massachusetts, and Providence, Rhode Island, joined Butler Paper in December 1984, and will continue to do business under the Chatfield Paper name.

All of the Butler locations stock a full line of fine printing papers and a wide variety of business papers. In addition, many of the locations handle industrial paper and sanitary maintenance products. In all cases, inventory is tailored to fit the needs of the individual markets.

Butler Paper is a company of Great Northern Nekoosa Corporation. Together with Mail-Well Envelope Company (also headquartered in Denver), it forms the paper distribution and converting segment of GNN's business, accounting for over $600 million in annual sales. Nationally, Butler Paper and Mail-Well Envelope employ approximately 3000 people.

NEKOOSA ENVELOPES CHANGES NAME

Nekoosa Envelopes, Inc. currently operates 11 plants in New York, Illinois, Tennessee, Colorado, Texas, Utah, Arizona, California, Oregon and Hawaii. Although these have done business under their original names for many years, a decision has been made to adopt one name for all plants and for the company to give it a solidified national image.

On February 1, 1985 Nekoosa Envelopes, Inc. changed its name to Mail-Well Envelope Company. At the same time, three Rockmont Envelope plants in Utah, Southwest Envelope in Arizona, Heco Envelope in Chicago, and The Photo Envelope Division in Rochester, New York also began using the Mail-Well name.

The Wisco Envelope operations will not be using the new name.

BOISE SELLS ENVELOPE DIVISION TO GNN

Boise Cascade Corporation announced recently the sale of its envelope division to Great Northern Nekoosa Corporation. This purchase will mark the departure of Boise Cascade from envelope manufacturing.

The sale includes envelope manufacturing operations in Rochester, NY; Cleveland, OH; and Allentown and Pittsburgh, PA. Great Northern Nekoosa will operate all four of these plants as part of its Mail-Well Envelope Company.

In a related item, Great Northern Nekoosa has announced the elections of James G. Crump and Francis G. Walker as vice presidents of the corporation. In addition, Mr. Crump and Mr. Walker will continue in their present operating positions as executive vice presidents of Nekoosa Papers, Inc., a subsidiary of GNN.

BIG PAPER BUSINESS IN COUPONS

Consumers are using coupons more than ever. 168 billion coupons were distributed last year. This is an increase of 18% over 1983 figures reports American Can Company. Their study of the coupon trade, reported in the *Wall Street Journal*, stated that they expect coupon distribution to be up by another 15% this year, and may top 400 billion by the decade's end.

Coupons *are* being used. An A.C. Nielsen survey last year found that 79% of all households redeem coupons regularly compared with only 65% in 1975. The retail value of all coupons redeemed last year was $2.2 billion—each having a face value of about 26 cents. That is up from a 1980 average of 18.5 cents.

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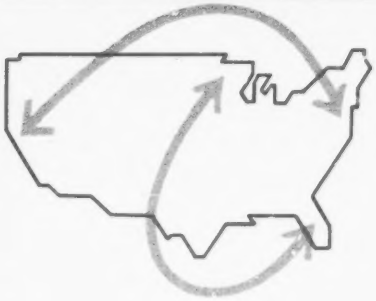

Professions Unlimited is a 13 year old recruiting firm specializing in the paper distribution industry with emphasis on flexible packaging, fine paper and industrial supplies. Professions has placed over 100 people in these areas since 1981—from New York to California, Minnesota to Florida. 80% of those placed were experienced in the paper merchant trade, the remainder were from manufacturers serving paper merchants.

To find out how you or your firm can benefit from our services contact Carl Coco, Jr., CPC, Executive Vice President or Philip R. Gross, CPC, Vice President National Accounts.

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*Please note: Our policy states that we only work with one merchant house per city.

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PAPER MILK CARTONS HELP LOCATE MISSING CHILDREN

Potlatch Corporation and Southern California's Alta-Dena Dairy have unveiled their campaign to aid in the nationwide search for missing children. They have begun printing photographs of the children on the side panels of their half-gallon cartons.

Alta-Dena, in cooperation with the Los Angeles County Sheriff's Department, plans to publicize two missing children each month on the 400,000 half-gallon containers it distributes to supermarkets throughout Southern California. Each carton will display the names, faces, descriptions and last known sightings of the two youngsters, along with the telephone number of the sheriff's department.

State officials said that as many as 24,000 children were reported missing in California last year. All but 1,600 of the youngsters, many of them runaways, were found or returned to their families voluntarily, but law enforcement officials hope the Alta-Dena program, and others like it, will help them locate children who are still missing and prevent future disappearances.

According to California's assemblyman Gray Davis, who supports the program and plans to introduce legislation calling for tougher criminal penalties in child kidnapping cases, "This type of program may prompt parents and kids to talk about how to deal with strangers and strange situations... There are few things more prominent on a breakfast table than a carton of milk."

The concept of printing the photographs of missing children on milk cartons first originated last year in the Midwest, with one of the first companies being the Hawthorn Melody Dairy of Wisconsin. The first of their milk cartons were distributed in the Chicago area and within a couple of weeks, the Chicago police department had received over 20 leads.

This type of campaign may be just the beginning, according to Potlatch officials. The use of paperboard milk cartons to educate the public about important social issues is an idea whose time has come.

UNISOURCE REPORTS 1984 REVENUES UP 25%

The largest paper distribution company in the country, Unisource, reported that 1984 gross revenues reached $1.35 billion—up 25% over the previous year. According to the Alco Standard annual report (the parent company), Unisource has sustained a 13.1% five-year compound growth rate in revenue.

The report stated that 1984 saw a decline in its gross trading margin due to competitive pressures and changes in sales mix. But, tighter expense control, improved data processing efficiencies, and the consolidation or closing of marginal facilities allowed a reduction in operating expense from 75.2% of their gross trading margin in 1983 to 74% last year.

As a result of the strong sales gains and reductions in operating expenses, operating income for 1984 increased 23% to $48.3 million. Overall, the paper products group has increased its return on investment from 23% in 1983 to 26.5% last year.

PEOPLE IN THE NEWS

Frederick B. Callahan has been elected president and chief operating officer of Colony Papers, Inc. of York, PA.

Joel Farkas has become a partner of the J. Liberman Company of Bayonne, NJ. **Margaret Guida** was named administrative manager, **Carol Bergalowski** has become customer service supervisor and **Helen Romanowski** is now purchasing director. **Frank Hallamek**, partner and secretary-treasurer of the company will retire.

Richard Hamilton has been named director of marketing, fine papers for Carpenter/Offutt.

William H. Snyder, Jr. has been appointed branch manager of Virginia Paper Company's Fine Papers Company division in Little Rock and Rogers, AK.

Arnett Leslie, retired president of the Leslie Paper Company of Minneapolis, MN, passed away February 5, 1985 at the age of 93. He was president of NPTA, 1934-35.

John A. Georges has been elected chairman of International Paper Company. He will continue as CEO. **Paul H. O'Neill** was elected president.

Henry F. Frigon was named chief operating officer of Batus, Inc., the parent company of Appleton Papers. He is in line to succeed **Charles McCarty** as chairman and CEO when he retires at year's end.

Joe L. Cooper has been elected president and CEO of the Container Corporation of America. He succeeds **Robert O. Swanson** who was named executive vice president for international refining and marketing operations for Mobil Oil.

Kenneth G. Haggerty was elected vice president and sales manager-primary products for Gilman Paper.

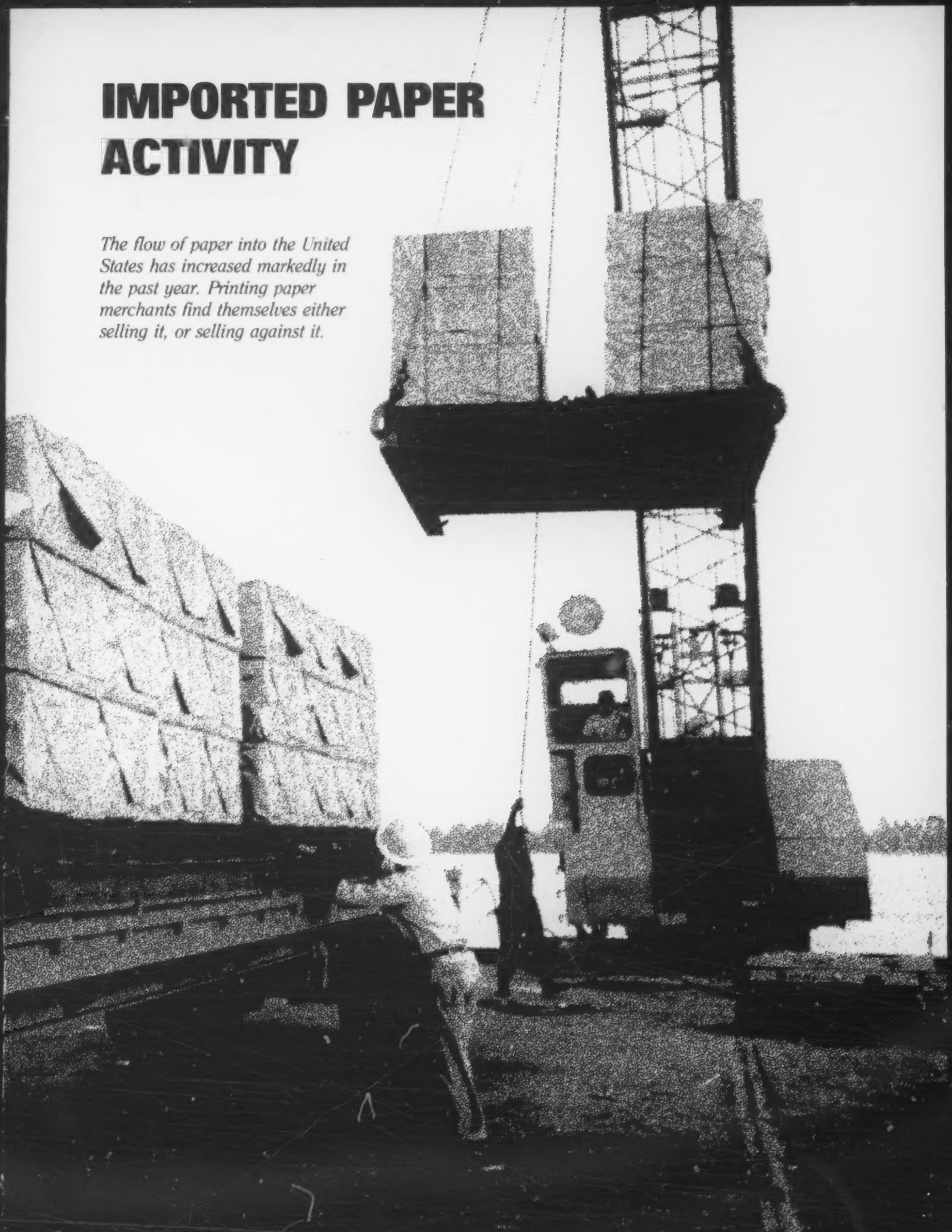
Ronald W. Joscelyn was named vice president, sales for the Curtis Division of James River.

Dr. James J. McKeown was appointed division vice president, Industrial Specialties Division of 3M.

Jerome F. Tatar has been named vice president of marketing for the Mead Corporation. He was formerly president of Mead's Gilbert Paper unit.

IMPORTED PAPER ACTIVITY

The flow of paper into the United States has increased markedly in the past year. Printing paper merchants find themselves either selling it, or selling against it.



INTERNATIONAL

PAPER DISTRIBUTION'S CHANGING

Question: What weighs 854 billion pounds and arrived in America last year?

Answer: Imported coated paper.

It sounds like a great deal of paper, but it only represents about 6½% of the total amount of coated printing paper consumed last year in the United States. Then why all the fuss over the international paper scene? It is more than just paper that is involved. . . much more.

There is no secret that the importation of paper is a trend that is growing. Imports of coated paper jumped 176% in 1984 over 1983, reports the American Paper Institute (API). And uncoated free sheet imports more than doubled.

When talking about imported paper, one must go out on the street and ask the merchants who sell it, or sell against it. They know that imported paper is becoming a significant factor in the printing paper marketplace, especially on the coated side.

It is clear that European paper makers have been interested in the U.S. paper trade for many years. But there have been a number of new developments that are worth noting. Dr. Irene Meister, vice president-international for API tracks changes taking place in the import of paper. She said, "The new development in 1984 was the sudden and unanticipated influx of uncoated free sheet paper from the less developed countries, specifically Brazil and Mexico. There are many reasons for this, chief among these are price controls and subsidies in the exporting countries, and the strong U.S. dollar. Export prices in Brazil and Mexico are *not* controlled so they found an outlet where they could get a better price—the United States."

Paper moves to the United States from foreign shores.

The economic realities of the world market brought the U.S. quite a bit of paper, especially from Europe and South America.

The European Connection

For many years, European papers have been marketed in the U.S. with limited success. There have been a number of reasons for this. As markets for paper on both continents fluctuated, American merchants became skeptical about the constancy of their European supply line. Could it be relied on in the face of changing market pressures here and abroad?

Some merchants who tested the international waters soon found themselves high and dry, and without paper to sell from their European connections. Most never tested the waters at all.

But now things are different. Some say *very* different.

European paper manufacturers have been pursuing the American market vigorously for the past 18 months with greater success. The reasons for their success are these: the tight American supply situation in certain grades of printing paper has caused merchants to look elsewhere to find paper to sell; the strong U.S. dollar has attracted European manufacturers; and most importantly, some European paper mills have now begun to allocate a portion of their production for the American market.

This last reason is the most revealing. These manufacturers are telling American paper merchants that they are here to stay. Is this giving them new success? Peyton Shaner, vice president-printing papers for the Henley Paper Company in Greensboro, NC thinks so.

"We have been selling a European line (Star) for almost a year. The reason why I hesitated so long is that I remembered how the European mills came and went. When things got better in the states, they disappeared. The difference now is that they are committing themselves to the American market. They are doing things they've never done before," Shaner said.

U.S. Redistribution

An American merchant can buy printing paper directly from an overseas mill if he can place a large quantity order. This is often quite difficult for most. The alternative is to purchase paper from an importer who has set-up a good pipeline. The U.S. merchant then deals almost exclusively with his importer.

INTERNATIONAL SCENE

Paper Sources International (PSI) is one such organization. Well connected with a European supply, PSI has made it easy for their selected merchants around the country. Raymond E. Weaver, president of The Brewer-Chilcote Paper Company operation of Cincinnati Cordage has been selling Zanders paper supplied to him from PSI for about two years. "Anyone would be concerned about their relationship with a foreign mill. But, I feel that the combination of B-C, PSI and Zanders is an unbeatable team. We have found the folks at PSI and Zanders a pleasure to deal with."

The redistribution system is arranged so merchants are given an exclusive in their areas. This helps the merchant solidify business for the foreign paper he sells.

The American Standard

According to a number of U.S. merchants, the problems with the European connection goes beyond the reliability of the source of supply. "We chose to do business with the manufacturer who produces products to American sizes and weights, and also follows an American packaging program. When you're out there selling paper, the metric size and weight question is one less thing to worry about," said Peyton Shaner. "There is enough resistance to foreign paper the way it is. Having American sizes certainly helps."

PSI's Zanders line is not manufactured to American size and weight standards but this has not caused marketing problems for the merchants who deal in these products, reports Raymond Weaver. His company specializes in working with specifiers. "All the size question meant was educating our design customers to these sizes so they might take the best advantage of the sheet. These high quality coated printing papers run very well on American presses and so printers have no difficulty with them."

But there are those who disagree. Elwyn Lieberman, president of the Allan & Gray Company, a New York City paper merchant who deals almost exclusively with specifiers, does not sell an imported sheet. "The problem as I see it is that the European coated papers carry more coating (and less fiber) and so the ink drying times are longer. It doesn't fit the standards of what we do."

"I don't want to buy high-line coated from offshore because the art is unusual [to metric size sheets], the separations are different, the inks are different, and I don't have any control of the manufacturer. If a printer puts on certain tack inks in a certain sequence on a sheet of paper to

U.S. PAPER IMPORTS
(Million Tons)

Year	Coated Paper	Uncoated Free Sheet
1976	15	134
1977	112	155
1978	214	113
1979	189	142
1980	115	119
1981	39	119
1982	69	157
1983	162	223
1984*	427	476

*Annualized based on 11 months.

Source: U.S. Department of Commerce & American Paper Institute

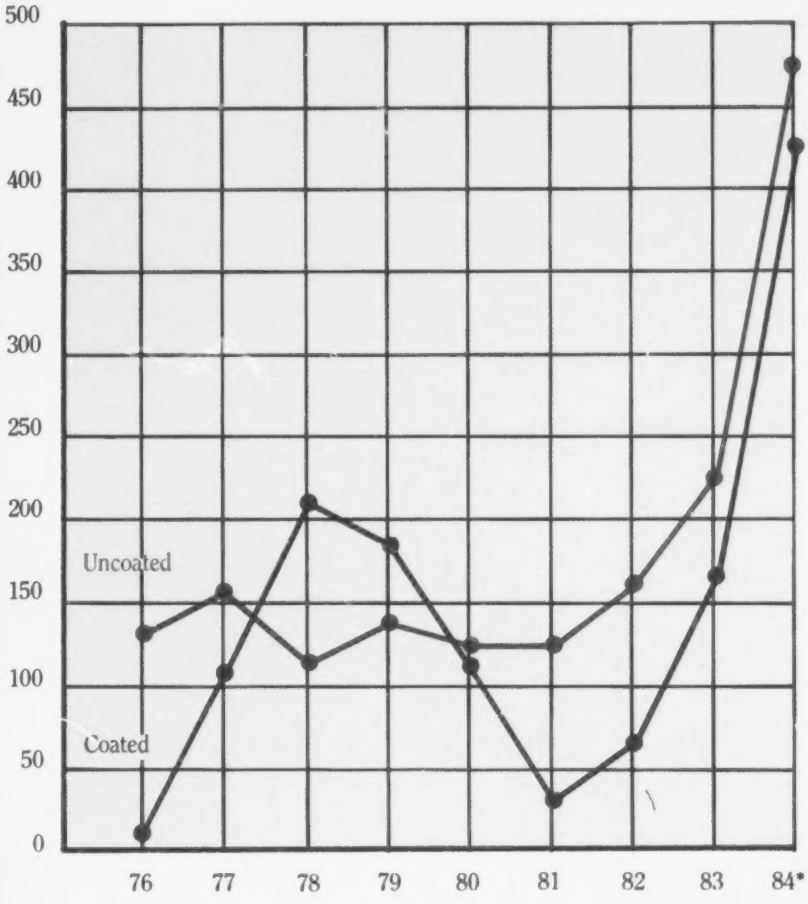
U.S. PAPER IMPORTS
(Million Tons)

Paper Grade	1982	1983	1984*
Paper, Paperboard & Products	7,603	8,509	10,599
Printing & Writing	764	1,151	2,040
Uncoated Groundwood	515	732	1,074
Uncoated Book	143	154	254
Coated Printing & Impression Paper	29	162	397
Writing & Similar Paper	26	81	261
Thin (except cigarette)	11	20	53
Total Packaging & Other Paper	80	108	152
Unbleached Kraft	23	42	47
Other Packaging & Industrial Paper	57	66	105
Tissue	7	12	22
Converted Paper & Paperboard Products	107	152	214

*Annual rate, YTD, based on data Jan.-Aug.

Source: U.S. Department of Commerce

U.S. PAPER IMPORTS
(Million Tons)



*Annualized based on 11 Months

Source: U.S. Department of Commerce & American Paper Institute

(For complete details, see table on top of page 11.)

Paper Import Data

The U.S. Department of Commerce collects data on imports for various grades of fine paper, including: coated printing and writing paper, unbleached and bleached wrapping paper, uncoated book paper, boxes made of paper, paperboard or paper mache, etc. The tables on pages 13 and 14 are a breakdown of paper grade, by country of origin for the nine month period January-September 1984. This is the latest data available. These "imports for consumption" are expressed in terms on net quantity (M tons) and customs value.

which he's not familiar, he will get a different result. This is the type of dialog [with my customers] that I don't need," Lieberman concluded.

But many *are* having success with imported paper products. And there is nothing wrong with a paper that is a bit different (many say "better"). Does it require extra effort for the printer? Bill Lamparter, president of Printcom, a consultant and printing industry specialist, does not think so. "You have to learn how to run the sheet. Once you've learned the difference, it works just fine. There's nothing wrong with the paper. There are some changes in ink holdout characteristics as there are differences in the way the sheet handles on press. So, you have to make the ink, paper, plate and blanket work together as a system. And once you've done that, there's no problem."

Is It Just For The Large Distributor?

Can a small paper merchant sell an imported sheet? According to most paper merchants selling imported paper, the answer is no. A merchant must be of a sufficient size to convince the supplier that his company will move the necessary volume.

William Carrier, president of Queensboro Paper Company, a small printing paper merchant in Jamaica, NY, agrees with this perspective. "I'm too small a merchant to buy the tonnage necessary. I can purchase imported paper from another merchant and resell it. But, one experience I had got me fairly beat-up paper, so I don't go looking for it."

"I am seeing more and more imported paper in the marketplace to compete with," Carrier said. "I don't think it's going to go away; it's something we're going to have to live with."

What's Ahead

Is imported paper here to stay? The incredible growth in paper imports during 1984 gives rise to the question. Strategic futures forecasts an expected shortfall of printing and publication grades of 550,000 tons this year. This includes coated groundwood #5, coated free sheet #1-4 and uncoated groundwood papers. Their study was based on interviews with paper producers and merchants in the United States, Canada and Europe and major end-use markets.

The reasons for the shortfall are these: limited new capacity increases, foreign sources may not be able to provide support beyond 1984 levels, greater demand by end-use markets, and strong European markets for paper may diminish their exports.

At the moment, some industry experts see the amount of uncoated free sheet imports lessening, and they expect that trend to continue through 1985, especially if the dollar loses some ground. Grade substitution will continue as long as there is a tight supply situation. Of course, the American coated paper makers are still operating at full capacity and that should continue in the foreseeable future. By 1986 or 1987, some new coated capacity should be brought on-line. The question is: Will the demand continue to be stronger than the new American supply?

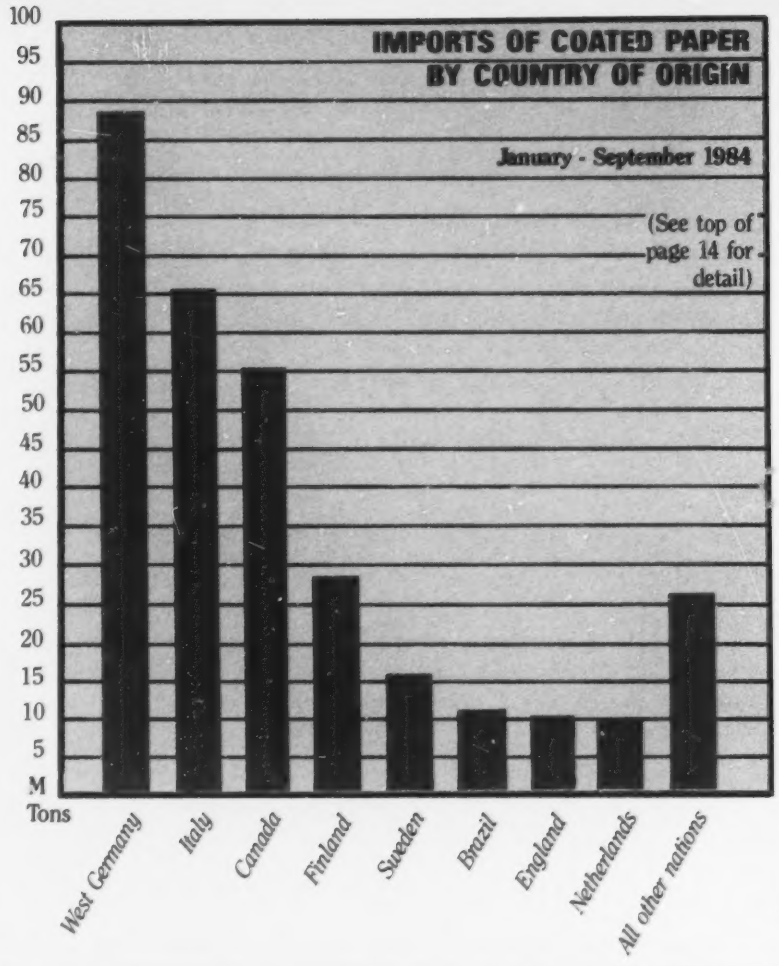
The View From England

The National Association of Paper Merchants (UK) met on November 20, 1984 to discuss the challenges of the year ahead. President Eric Doorbar discussed the current market situation and Charles Bannatyne of Wiggins Teape presented the economic outlook. His conclusions were as follows:

- The U.K. economy is forecast to grow by 2.5% in both 1984 and 1985.
- Inflation is likely to remain in the region of 5-6%, and with average earnings expected to rise by 7-8% consumer spending will continue to grow.
- The business environment will remain intensely competitive despite continued, positive, economic growth.
- The market for printing and writing papers should remain firm to mid-1985 but over the year as a whole demand is unlikely to show significant gains on 1984 levels.
- As 1985 progresses, pressure on paper producers' margins will become more intense as additional capacity and flatter demand trends re-establish a buyers' market for most grades of paper.
- Cost pressures on paper producers will be less apparent, with the probability of stable/falling raw material costs in 1985. This, together with slacker demand growth, suggests a period of weak paper prices.

What Do You Think?

The experience of paper merchants across the country is of great interest to *MN*. I. you wish to write to the editor on the topic of imported paper, you may see your letter in a future issue of *MN*. Your views are valuable. Write and be heard!



IMPORTS SUMMARY - JAN.-SEPT. 1984

Major Paper Grades	Net Quantity (M tons)	Customs Value ($ millions)
Coated Printing and Writing Paper (over 18 lbs. per ream)	314	215
Uncoated Book and Printing Paper (not over 10% mechanical wood pulp)	189	119
Uncoated Book and Printing Paper (containing over 10% mechanical wood pulp)	825	408
Miscellaneous Uncoated Paper (not ruled, lined, printined embossed or decorated)	146	69
Wrapping Paper, Bleached and Unbleached, including bag and sack paper (18 lbs. per ream)	59	36
Boxes of Paper, Paperboard or Paper Mache (including those lined with specified materials)	28	62
TOTAL	1,562	907

U.S. IMPORTS OF PAPER BY COUNTRY OF ORIGIN

from The U.S. Department of Commerce

(January-September, 1984)

Country	Net Quantity (M tons)	% of Total	Customs Value ($ Million)	% of Total
Coated Printing and Writing Paper				
W. Germany	89	23	59	27
Italy	66	21	43	20
Canada	56	18	39	18
Finland	29	9	18	9
Sweden	17	5	12	6
Brazil	12	4	6	3
England	11	3	9	4
Netherlands	10	3	8	3
All other nations	27	9	22	10
TOTAL:	314	100	215	100
Uncoated Book and Printing Paper (not over 10% mechanical wood pulp)				
Canada	78	41	52	44
Brazil	19	10	9	8
W. Germany	18	10	11	9
Sweden	16	8	9	7
Finland	12	7	7	6
England	10	5	8	7
All other nations	36	19	23	19
TOTAL:	189	100	119	100
Uncoated Book and Printing Paper (with over 10% mechanical wood pulp)				
Canada	428	52	204	50
Finland	254	31	128	31
Sweden	48	6	24	6
Norway	45	5	25	6
W. Germany	15	2	8	2
All other nations	35	4	19	5
TOTAL:	825	100	408	100
Miscellaneous Uncoated Paper (not ruled, lined printed, embossed or decorated)				
Canada	99	68	30	44
Brazil	25	17	15	21
Finland	4	3	4	5
W. Germany	3	2	3	5
Mexico	3	2	2	3
Sweden	3	2	2	3
All other nations	9	6	13	19
TOTAL:	146	100	69	100
Wrapping Paper, Bleached and Unbleached (including bag and sack paper, 18 lbs. per ream)				
Canada	48	82	30	84
Sweden	8	14	4	12
Chile	2	3	1	2
Finland	1	1	1	1
All other nations	—	—	—	—
TOTAL:	59	100	36	100

WHO'S BUYING AMERICAN PAPER MERCHANT HOUSES?

Foreign and international ownership of paper distribution is a growing trend. Why?

It is clearly not a temporary situation. Foreign interests in U.S. paper manufacturing is a constancy. But now merchants are receiving offers from European and Canadian firms that many have found difficult to refuse.

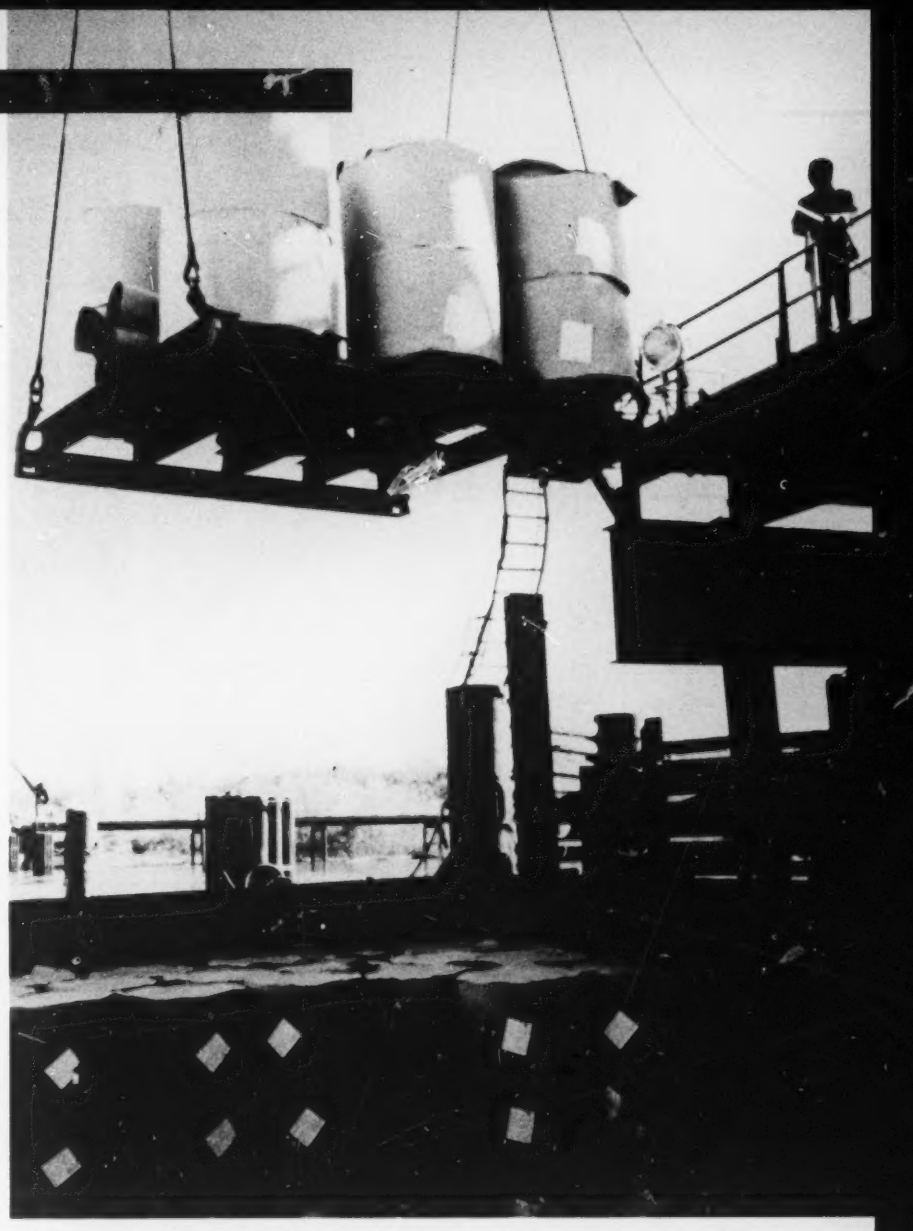
In the past year, a number of paper merchant operations have been purchased and are now foreign owned. Abitibi-Price, a Canadian paper manufacturer, owns the single largest paper merchant in Canada—Inter City Papers Ltd. headquartered in Montreal. Their purchase of Whitaker Carpenter, a Chicago based printing paper merchant having sales of $73 million annually marked its first venture in the United States.

Rolland, another Canadian paper maker that owns distribution in Canada has recently purchased W.H. Smith Paper, a printing paper distributor in Albany, NY and C.H. Robinson, a dual merchant in Portland, ME.

The largest purchase in 1984 was the acquisition of the Lindemeyr Paper Corporation by Central National-Gottesman. The new owner is the world's largest, privately owned pulp and paper company with representatives or offices in 74 countries. Gottesman is expected to have sales in 1984 of over $1 billion.

What is the attraction for international companies? Obviously, the United States is considered a "safe haven" for investment. A stable economy, strong currency, a qualified workforce, ready market for goods and a pro-business government that taxes business at a lower rate than their home countries, makes American business enterprise a very good place to put their money.

Sam Antupit, president of Cartonal-USA, a wholly owned subsidiary of Holzstoff A.G. of Basel, Switzerland, knows the advantages to foreign ownership. His company is seeking to purchase American paper merchant operations. But what about the advantages to the merchant firm after it is acquired?

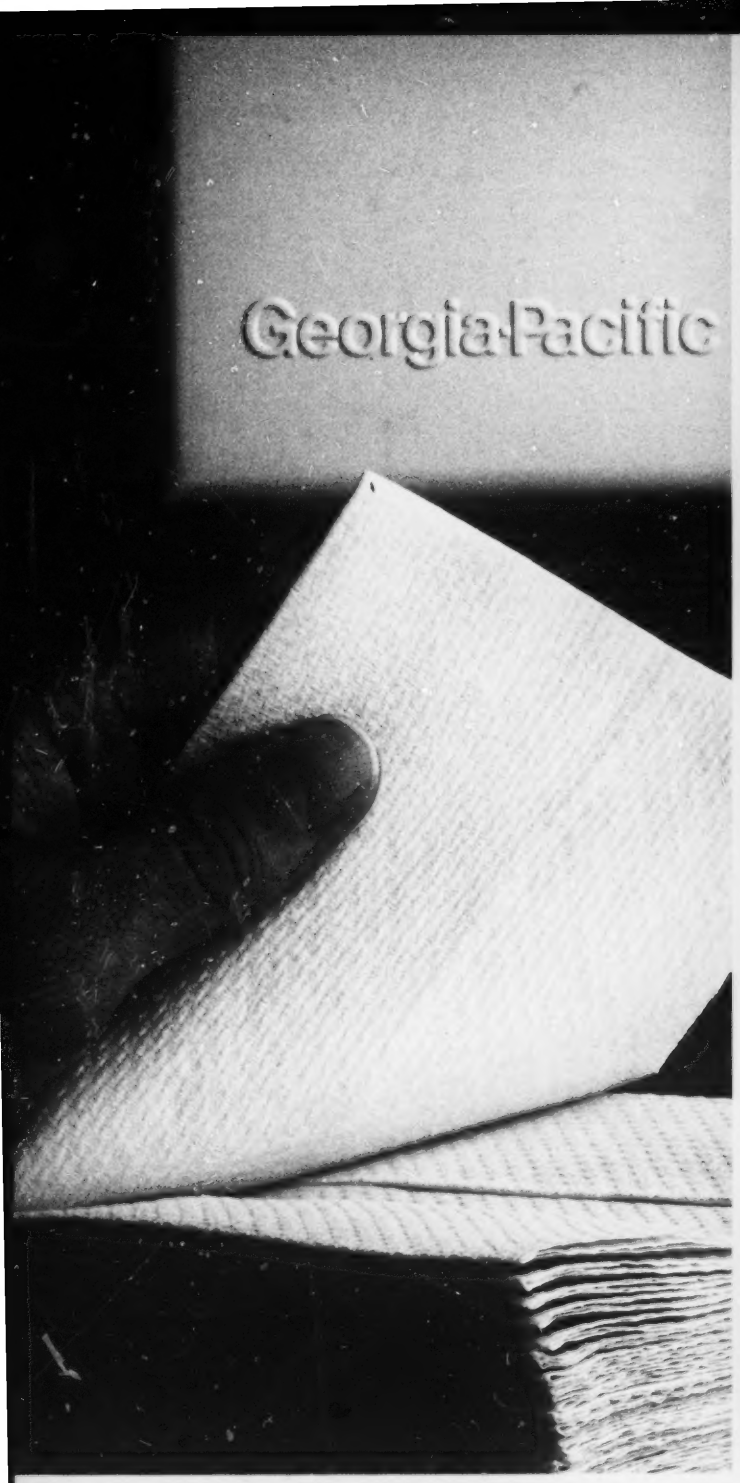


The internationalization of the paper business is about companies as well as commodities.

"It's nice for a paper merchant to be owned by a foreign company because the owners don't get involved in the operation so much. Whereas if an American firm purchases an American merchant house and it becomes a subsidiary, there are a lot of people looking over your shoulder. Foreign ownership is different. You may not see those people for a long time."

John Selig, executive vice president and general manager of W.H. Smith Paper adds another perspective. After his company was purchased by Rolland, he found that there was much more reporting to be done.

"The basic method of doing business is the same. We have some new rules and regulations to follow. This change is good because now at least we know why we're doing things and why we have a warehouse full of paper.



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Georgia-Pacific has all the soft and absorbent paper towels and tissue your restrooms need.

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Georgia-Pacific one-ply and two-ply roll tissue are soft and absorbent, and made to break up quickly in plumbing and septic systems.

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"Before it used to be that some salesman would come in and make a presentation and it looked good, so we'd buy it. We'd go out and do a job for two months and then the balance of that item would sit here and get moldy. With this new system that just doesn't happen."

National Associations of Other Countries

For those wishing more information on paper distribution in other countries, the following is a list of associations representing paper merchants in nine other countries.

The National Paper Marketing Council of Australia
Suite 8
1 Johnston Lane
Land Cove West, N.S.W. Australia 2066
H.G. Kraefft, Executive Officer

Canadian Paper Trade Association
55 York Street, Suite 512
Toronto, Canada M5J 1S2
Frank Young, Secretary

The National Association of Paper Merchants
3 Plough Place
Fetter Lane
London EC4A 1Al
England
R.W. Bray, Deputy Director

Federation Du Commerce
Des Papiers Et Cartons De France
76, Avenue Marceau
75008 Paris 8e
France
Roger Glineur

The Tokyo Paper Trade Association
Kami Parupu Kaikan Building
9-11 Ginza 3-Chome, Chuo Ku
Tokyo, Japan
G. Yamaguchi, Executive Director

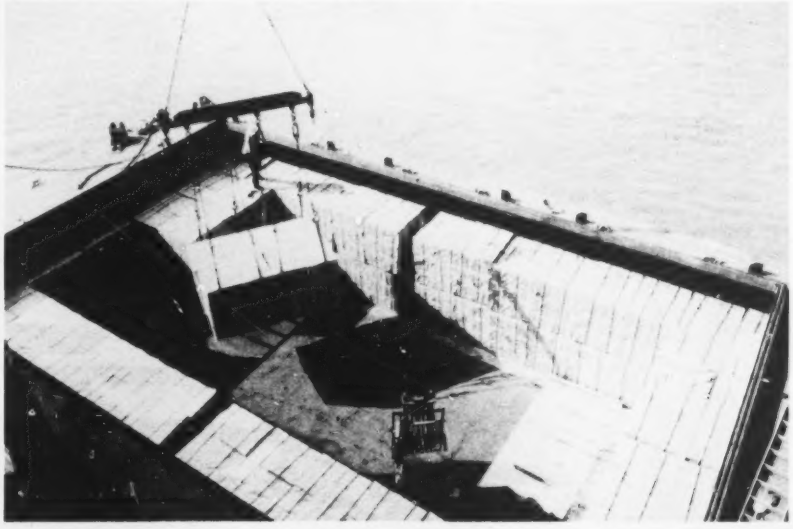
New Zealand Paper Merchants' and
Manufacturing Stationers' Association
IBM Centre
155-161 The Terrace, Wellington 1
P.O. Box 10-340
New Zealand
R.B. Young, Secretary

Papirgrossistenes Landsforening
Drammensveien 30
Hansteensgt 9
P.O. Box 2477 Solli
Oslo 2 Norway
Helge Aarseth

Svenska Pappergrossistforbundet
Swedish Paper Trade Association
Grevgatan 34
Box 5512
114 85 Stockholm
Sweden 08/63 52 80
Telex: 19673
Stellan Minnhagen, Director

Verband des schweizerischen
Papier- und Packmaterial-Grosshandels
Forchstrasse 36
Postfach 290
CH-8032 Zurich
Switzerland
Max Broger, General Secretary

More paper being shipped to American markets.



Did You Know?

- The United States is the world's largest consumer of paper.
- Most imports of printing paper come from Germany, Canada and Italy.
- Most paperboard, papier mache and boxes that are imported come from Canada and Japan.
- Most bleached and unbleached wrapping and sulphate papers that are imported come from Canada and Sweden.
- The United States consumes half of the world's newsprint.
- Three-quarters of all products exported from Canada are purchased by the United States.

Nominations Are Now Open For The

Stanley O. Styles Industry Excellence Award

And The Winner Is....

1984 winner William Zellerbach

The prestigious Stanley O. Styles Industry Excellence Award will be presented at the 1985 Chairman's Luncheon to be held on October 7, 1985 in New York City. This event will be the climax of the NPTA Annual Convention.

Those wishing to nominate an outstanding industry leader should direct their letters of recommendation to: John J. Buckley, Jr., president of NPTA, 111 Great Neck Road, Great Neck, NY 11021. Past nominations will be reconsidered. All nominations must be received at NPTA Headquarters no later than **April 15, 1985**.

Selection Criteria

1. The recipient of the award shall be a paper merchant, paper manufacturer or converter, consultant, or educator who has had a distinguished career in the paper distribution industry.
2. Someone who has had a positive influence on the paper distribution industry: Possibly from the introduction of new management methods, marketing concepts, or new products which have become important in the industry.
3. The award recipient will be one who is acknowledged by the paper distribution industry as a leader and a good representative of the values and traits necessary for the excellent conduct of business.
4. Someone who has been long involved in industry affairs through actions and has supported the industry's trade associations, mills, merchants and affiliated groups.
5. Someone who has been a spokesperson for the industry locally and/or nationally.
6. The recipient will be one who exhibits impeccable character and is a long time, good citizen of the paper industry.

INDUSTRIAL PAPER

CUSHIONING: A BETTER WAY COMING

According to a recent article in *Handling & Shipping* magazine, new cushioning materials will help the industry protect particularly sensitive products such as electronic equipment that needs additional coverage against shock, vibration and electrostatic discharge (ESD).

Arco Chemical Co. and BASF Wyandotte Corp. are each introducing moldable, polyethylene-based materials, while Dow Chemical will soon be marketing a material that is primarily polystyrene-based. This new material is much more flexible than the usual expanded polystyrene, according to Alfred McKinlay, consultant, packaging and handling.

McKinlay claims that because both new cushioning materials are pre-molded, they will be less expensive than the fabricated foam plastic material now widely used. "The materials will also enable the packaging designers to be a bit more clever in their designs," he says.

The two materials are especially applicable to high-volume, delicate equipment, such as electronics and computers. They do a better job in less space, and therefore, are more efficient.

Arco has also found its new product being used as "returnable dunnage." Customers are using it repeatedly, not only for cushioning but for blocking or bracing as well.

Along with the cushioning materials, there have been new developments in foam-in-place material. Several companies have introduced foams that are much more fire retardant, and less of a storage problem in warehouses, according to McKinlay.

In addition, one company is announcing a new, super-light density foam to be used primarily for void-filling or dunnage for lighter products. The big plus is that it will cost less than what's on the market now. The introduction of these products should aid industrial merchants in meeting the needs of their customers and in adding new customers.

WHO'S THE COMPETITION?

One of the many other distributors that are currently becoming greater competition for the industrial paper merchant are the Tobacco and Confectionery Distributors. In recent years, both external and internal forces have caused Tobacco and Confectionery Distributors to seek additional product line commodities. These forces such as social disapproval of tobacco, coupled with lower profit margins because of manufacturers' price increases have caused drastic reductions in volume sales of these products.

According to a recent study conducted by the *U.S. Tobacco and Confectionery Journal*, Tobacco and Confectionery Distributors reported that warehouse space allocation for paper goods now occupy 9.3% of their warehouses, third only to cigarettes (19.4%) and confectionery (29.6%). The next closest product to paper goods are tobaccos (such as pipe, cigarette and chewing tobaccos) at 7.6%. This indicates a strong desire to extend the paper goods area of their businesses. (See chart A).

While the study reports only 11% of their profit comes from paper goods, the only commodities with a larger share are cigarettes (49%), confectionery (33.8%) and lighters (18%). Part of the study asked participants for their opinion of "other merchandise growth potential." (See chart B).

Overall, the product line with the greatest potential for increased sales was groceries at 65%. The probable reason for this is that most Tobacco and Confectionery Distributors service convenience stores, chain drug, supermarkets and restaurants, all of which lend to sales of grocery products. Next on the list was paper goods at 48% and health and beauty aids also with 48%. Due to the changing nature of the distributors' product lines, all three of these categories mean extra dollars in both volume sales and profits because the basic "cash flow" of both cigarettes and confectionery carries their business. As such they are able to sell these products at far less than paper merchants, and grocery and drug wholesalers. However, they are

Chart A

WAREHOUSE SPACE ALLOCATION: TOBACCO/CONFECTIONERY DISTRIBUTORS

(Firm Sales in Millions)

Commodity	Under $25 (%)	$25-$75 (%)	Over $75 (%)	Total (%)
Confectionery	33.8	26.6	32.6	29.6
Cigarettes	17.8	20.3	18.0	19.4
Paper Goods	8.0	10.4	7.1	9.3
Tobaccos	6.8	7.3	9.7	7.6
Cigars	7.0	6.7	9.2	7.3
Other	1.1	6.8	8.8	6.4
Groceries	5.3	5.8	7.4	5.9
H & BA	5.1	5.2	3.2	4.9
Snack Foods	3.7	5.5	1.5	4.4
Restaurant Supply	5.5	4.0	2.1	4.1
Lighters	1.0	1.3	0.4	1.0

Chart B

OTHER MERCHANDISE GROWTH POTENTIAL: TOBACCO/CONFECTIONERY DISTRIBUTORS

		% Groceries	% Paper Goods	% Health & Beauty Aids	% Institutional Foods	% Other
Sales	under $25	67	33	33	67	33
In	$25-$75	67	58	58	25	17
Millions	over $75	75	50	50	25	75
TOTALS*		65%	48%	48%	35%	30%

**Note: Totals exceed 100% due to multiple responses.*

also being hurt by these same distributors because both the grocery and drug wholesalers can sell both cigarettes and confectionery at a lower wholesale price than the tobacco/confectionery distributor can. In essence, the competition between all of these categories is increasing considerably. Many experts have noted that the term of "Master Distributor" will become more and more used as the distributors increase the number and type of commodity lines each carries. Because the current retail and wholesale outlook is a single vendor/single shopping location, the onus will be on the distributor to supply his accounts with all he can. The additional reason for this is that the cost of delivery is growing rapidly. Therefore, the more merchandise delivered the less cost per delivery.

Currently, tobacco and confectionery distributors' "paper goods" product lines include: *Food service:* disposable cups and plates, napkins, table cloths, plastic-ware. *Janitorial:* trash bags, towels, toilet tissue, various wipes. *Packaging:* paper sacks, food service, cardboard containers and boxes. *Cut-size paper:* all sizes, stationery, envelopes, pads. Wrapping paper, crepe paper and other decorative paper.

FOOD: THE NEW PACKAGING TRENDS

According to an article in *Handling and Shipping* magazine, changes in packaging are occurring in the food industry. Multilayered combinations of dissimilar materials provide more effective barriers against moisture and contamination. At the same time, the combinations offer strength, durability and body, notes Dick Blassey, industry analyst for the International Trade Association.

Some examples of the multilayered combinations include the coextruded bottle for V-8 vegetable juice and the thermoform container for Campbell soup. These containers are usurping the metal can and glass container, claims Blassey.

Besides these multilayered containers, aseptic containers are gaining in popularity. In fact, aseptics will make the greatest inroads in the next five years.

In addition, we'll be seeing more of the retort pouch and an increased use of radiation for sterilizing both food and packaging materials.

Lighter packaging for food and beverages is another important development. Substituting lighter weight flexible packaging and plastic containers and jars for metal or glass will sharply reduce transportation costs for many products, according to "Business Outlook," published by St. Regis Corp.

This means lighter pallet loads for the same cubic space and an increased need for stronger corrugated containers to provide protection when the products are moved.

The company also notes that reduced packaging costs will be obtained by improved packaging performance rather than lower cost materials.

Semi-bulk containers are also taking a more prominent place in the food industry. These containers significantly reduce the cost per pound for packaging material. Each container holds 1,000-2,000 lbs., as opposed to 30-100 lb. capacity of a fiber drum, small box or bag.

Product damage is reduced substantially, also, especially with breakable food products. According to Roy Schillaci, sales representative for Connelly Containers, product damage can be cut in half by using one large container properly vibrated down.

He cites the example of a major food company which used about five or six million pounds of crisp rice per year, packed in 30-lb. boxes. During the shipping process, the rice would vibrate and randomly settle, banging down on the bottom layer, causing a great deal of product damage.

With the bulk containers, the product is vibrated under controlled conditions so all the particles interlock. As a result, there is no massive weight bouncing on the bottom layer of the product.

Also, the wall thickness is much greater on the heavyweight 1,000 lb. box than it is on a 30 lb. box. "So you're getting additional cushioning when the product is banged from side to side in a rail, truck or ocean shipment," Shillaci states.

In general, he thinks the industry will experience increased utilization of slip-sheets, especially with case goods and bulk boxes.

Like bulk boxes, bulk bags are being used increasingly in the food industry. They often hold chemicals, cement, clay, or agricultural products, carrying from 1,000-4,000 lbs. But according to Andy Mintz, president, Bulk-Pack, "little has changed in the past year-and-a-half. No revolutionary raw materials have come into the market. The bags are still made of woven polypropylene primarily with polyester straps."

RECORD YEAR FOR PAPER OUTPUT

"The slow down in general business activity, which began in the third quarter of 1984, resulted in a somewhat slower pace of shipments of paper and paperboard in the closing months of the year. Operating rates in both the paper and paperboard grades slipped behind their very high first half performance as the year ended but were still high," said Louis F. Laun, president of the American Paper Institute in an economic statement released recently.

Despite this modest weakening in the last quarter of 1984, paper and paperboard production reached a new high for the year as a whole. At an estimated 69 million tons, production was 5.6% above the 1983 high," Mr. Laun noted.

Overall demand in several grades was higher than domestic shipments. Heavy demands for some grades of paper were supplied in part by larger imports, that totaled 10 million tons, 24% ahead of last year. In addition to newsprint imports which rose 15%, imports of other grades showed a 75% increase. Imports of paper and allied products totaled 11 million tons, also 24% ahead of 1983. Total exports held close to 1983's 4.5 million tons, the lack of growth caused partly by the high value of the dollar.

Consumers have positioned themselves well to finance increases in spending, particularly in the Spring of 1985.

The overall gain of 8% in the consumption of paper and paperboard conforms closely with the strong trend in business activity that prevailed in 1984, particularly in the first half of that year. Total economic activity, as measured by the real gross national product (GNP) rose by 7%, while industrial production—a good measure of the demand for packaging materials—rose by more than 11%.

1985 Outlook

"The recent slowdown in economic activity," Mr. Laun observed, "does not signal a decline in business but rather a pause that could reflect many uncertainties affecting consumer and business spending decisions. Discussions about tax reform, concerns over the federal deficit and the high value of the dollar, have contributed to uncertainties that may have dimmed confidence to some extent. As a result, individuals are hesitant about borrowing more in this uncertain climate and have instead chosen to increase their savings at a significant rate. Periods of large accumulation of financial savings of individuals are generally followed by expansions in spending about six months later. Consumers have positioned themselves well to finance increases in spending, particularly in the Spring of 1985.

"Interest rates appear to be in a continuing downtrend, helped in part by moderated credit demands and in part by increasing supply of savings and a more liberal monetary policy by the Federal Reserve. They should remain at the lower levels until mid-year at the least. These declines in interest rates will, after a while, encourage spending for durable goods and for housing in particular.

"Real GNP," Mr. Laun continued, "will probably show an increase of 3.5% in 1985. Demand for printing-writing grades of paper will advance a little faster than GNP as it usually does in periods of business expansion.

"Industrial production gains of 11% in 1984 will be followed by a marked slowdown in production in 1985. Inventory requirements are now near normal, and exports continue to be negatively impacted by the high value of the dollar. The gain in containerboard production for domestic use should be close to 4% in 1985, compared with a gain of almost 10% last year.

"Thus, 1985 would maintain the trend of recent years with major strength continuing in the demand for the printing and writing grades of paper and containerboard used largely in the production of corrugated shipping containers," Mr. Laun said.

In the publication grades, the production of coated papers in 1984 rose to 6.2 million tons, 9% above its 1983 high. About half of this total was used in magazines and other periodicals; the remainder went mainly to commercial printers. Among the other printing and writing grades, the major gains were in commercial printing and book publishing. Paper for business forms, including computer print-out papers, also showed

good growth. This gain reflected the continued increase in the use of computers in virtually all sectors of the economy, including the explosive gain in installations of personal computers. Copier papers also benefited from the growing number of copying machines installed. Thus, the paper industry has joined the high technology growth trends, and is benefiting from the large explosion in communication that results from its declining cost.

Newsprint consumption was also strong in the United States, rising by about 10%. A good deal of the gain benefited Canadian mills, which increased their exports to the United States by about 13% in 1984; domestic production of newsprint rose 7% and most newsprint mills operated near capacity.

The large rise in industrial production resulted in an increase of almost 10% in the production of containerboard for domestic use. Total production of linerboard, however, was affected by a 12% decline in exports. Increased packaging requirements in 1984 also benefited the boxboard grades, where production increased 8% over 1983.

Wood Pulp

The gain in paper production was reflected in a 7% increase in the production of the paper grades of wood pulp. Market pulp, which accounts for 10% of total U.S. pulp production, rose about 8%. This gain was concentrated in the domestic market, in line with the increases in output of printing and writing papers and tissue in U.S. mills as well as in domestic demand for fluffing grades. Exports increased slightly despite the negative effect of a strong U.S. dollar—rising about 1% above 1983.

Productivity Gains Continued in 1984

"Cost control continued to be a major goal of the industry, and results show success in 1984. For example, the use of fossil fuel and purchased energy per ton of output in the first nine months of the year was 4.4% below the comparable 1983 period. The industry continued the trend toward energy self sufficiency, generating about 55% of its total energy needs from internal sources, a little higher than the 54% so generated in 1983. The combination of higher efficiency and lower fuel prices is a very favorable one for the industry. The industry reduced its total consumption of fuel oil by 62% between 1972 and 1984 while increasing total production of paper, paperboard and dried wood pulp by 33%," Mr. Laun said.

Capital Expenditures

"API estimates that expenditures on plant and equipment to produce only pulp, paper and allied products amounted to $5.5 billion in 1984. (Expenditures made by paper companies for their non-paper divisions are excluded from these totals.) API's recent Capacity Survey indicates that average growth in paper and paperboard capacity during the 1985-1987 years will be 1.6% per year. These additions to capacity, along with the need to replace worn out or obsolete equipment, suggest that the industry's expenditures for pulp and paper facilities alone will have to be in excess of $6.5 billion a year during the next three years.

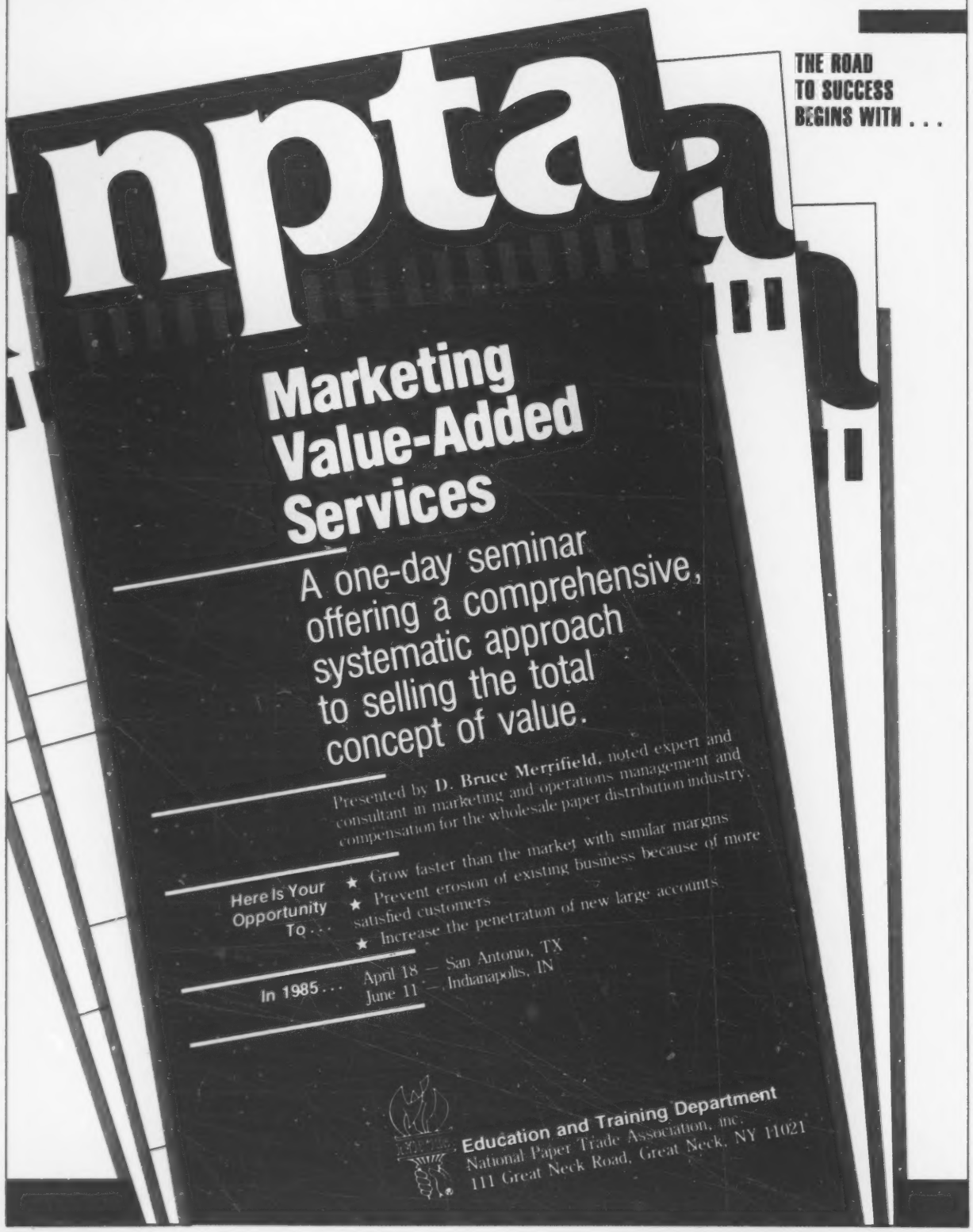
Cost control continued to be a major goal of the industry, and results show success in 1984... expenditures on plant and equipment—amounted to $5.5 billion in 1984.

Profits Increase

"Financial data for 32 publicity held paper and allied products companies indicate an increase of 18% in sales for the first nine months of last year compared with the comparable 1983 period, and a 71% increase over the low profits of 1983. The 1984 margin on sales averaged 5.6% in the first three quarters of 1984 compared with 3.6% realized in 1983," Mr. Laun concluded.

Wage contracts also continued to show the moderation that began several years ago. Labor agreements signed in 1984 included an average first year wage increase of 3.7%, compared to 5.6% negotiated in 1983. Some unusual features in West Coast contracts contributed to that performance; the average increase excluding the West Coast mills was 4.8%. About 20,000 more employees were on the payrolls in 1984 compared with 1983. The percentage increase was less than the tonnage gain, so that output per employee-hour increased 3.2%.

Educational Programs 1985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Education and Training Department
National Paper Trade Association, inc.
111 Great Neck Road, Great Neck, NY 11021

IN SALES: MAKE 'EM TAKE NOTICE

One thing that makes the life of a salesperson interesting, intriguing, fascinating and sometimes exasperating, is the variety of people and unique selling situations he runs into. In actuality, the successful salesperson doubles as an actor who is always on the stage. The roles that are played are as variable as the different types of people he deals with.

Handling a buyer, a problem buyer in particular, requires cleverness, sensitivity, analytical ability and, most importantly, tact and diplomacy. In a sense, every prospect is a problem until the salesperson makes him a customer.

The truly effective salesperson is equipped with three essential tools: professional selling skills, product knowledge and assorted techniques. Armed with these three major elements, the ineffective salesperson can be turned into an aggressive tiger, ready to crack major accounts.

David Brizius, Director of marketing communications, Copco Papers, Inc. and Chairman of the NPTA Education and Training Committee, has devoted considerable time to developing and implementing what he calls TNT - Technics in Training As a professional trainer, Mr. Brizius has elaborated on several tools that the salesperson can use to upgrade his skills and proficiencies. What follows are a variety of extracts from his proven theories of professional selling.

All the world is a stage. As a salesperson, you are "on stage" all the time.

Make "Mr. Know It All" Take Notice

As a sales rep, you probably call on the same buyer many times, and most likely he doesn't have an order each time you call. If this buyer is an "Old Timer" and is called on by many different printing companies, he probably thinks he is "Mr. Know-It-All." He has seen all kinds of sales demonstrations and has heard every sales pitch. So when you show him a sample, is it possible that he is paying little or no attention to you?

Here's one answer to this problem that I picked up on a flight out of Washington, D.C. (Remember, always keep your eyes and ears open for sales leads and customer need information.)

People like me who fly a lot don't really pay much attention to the plane's flight attendants as they talk about seat belts, exit doors and safety information sheets. Some airlines instruct the people to say things like: "For your safety, please read the..." or "It's important for you to listen to..." etc.

However, on that Washington, D.C. flight, the Piedmont flight attendant said, "Have you seen this before?" All of the "Know-It-All" passengers, including me, looked up to see who was holding the safety card that we had seen so many times before. She asked the right question and it got our attention. Why don't you try, "Have You Seen This Before?"

Practice - The Essence of Success

Didn't Shakespeare say something like "All the world is a stage?" As a salesperson you are "on stage" all the time. A top professional performer would never consider making a performance without plenty of practice and rehearsal time.

How about you, do you practice your sales pitch, your product demonstration, your product knowledge and your strategy before making a call on a particular customer? If not, you'll probably never win that selling Oscar!

Perhaps you relate more to golf or tennis. During the last Jack Nicklaus Memorial Golf Tournament, I observed the pro golfers practicing and establishing a strategy before every game. In fact, many of the golfers came right off the course and went directly to the practice tee to work on a particular problem.

So often we get our practice making a sales pitch on our first few calls and it's not until we've made several calls that we have our pitch down pat. Next time, preplan your sales call. Practice in advance and make your first call of the day as professional as your last.

Know Your Customer

A man once said, "You don't have a sale until you get the order." A smart man might think that it's not a sale until the product is delivered, but a much wiser man said, "You don't have a sale until it's paid for."

Do you think that most people in sales think about the philosophy that it's not a sale until it's paid for? If they don't, they should. Sales trainers spend a lot of time showing us how to do "pre-call research." Everyone should gather as much information as possible about a prospect before making that call. Knowing a customer's needs before you make a presentation is a definite help. Just make sure that your pre-call research includes credit information. There's no need to waste a sales call by making a beautiful presentation and then having your credit manager turn down the order because of poor credit. Or even worse, after it is sold and delivered, your customer doesn't pay.

Don't celebrate too quickly when a customer you've been trying to sell for years finally gives you that big order. There is a good possibility that you didn't really win him over. Your competitor may have stopped selling to your prospect because of his credit, which resulted in your receiving that order.

A Little Preaching

When salespeople make a call on me, I try to apply the Golden Rule. I treat each salesperson exactly as I want my salespeople treated. Too often the non-salespeople tend to give the sales rep a hard time, forgetting that their company has salespeople out trying to get the order too. Wherever you work, it might be wise to suggest to your buyers to use the Golden Rule.

Not long ago, a sales rep was making a presentation in my office. When he finished, I tried to give him a little sales pitch of my own. The person picked up a presentation folder from my desk before I wanted to hand it out. This meant that he was looking at the folder and not listening. To get control of the sales presentation, and to get that customer to look at me and to listen to me, I merely used his name. He immediately looked up, I gained eye contact and control, and continued my

presentation. Recall that during my sales training class I always teach that "you have ten seconds of undivided attention every time you use your customer's name during the presentation." Indeed, I practiced what I preach, and it worked. It will work for you, too.

TNT - Techniques In Training

Many times, a buyer doesn't want to buy from you because, "he sees no need for your product or service," "he is satisfied with his current supplier," "or he may not be aware of his needs." Recently, the Envelope Manufacturers Association put out a sheet entitled, "40 Symptoms of a Closed Mind." Many of these sayings could come from a buyer who is indifferent. Remember, when a customer shows indifference, you use product knowledge and background information on him to ask closed questions that will uncover needs.

Forty Symptoms of a Closed Mind - And Every One Has Been Used!

1. We tried that before.
2. Our plant is different.
3. It costs too much.
4. We're all too busy for that.
5. It's too radical a change.
6. That's not my job.
7. We don't have the time.
8. Not enough help.
9. Our plant is too small for it.
10. Not practical for our people.
11. The employees will never buy it.
12. The boss will scream.
13. We've never done it before.
14. It's against company policy.
15. We don't have the authority.
16. That's not our problem.
17. Why change it? It's still working O.K.
18. You're right, but...
19. We're not ready for that.
20. We don't have the money - equipment - room - personnel.
21. You're two years ahead of your time.
22. It isn't in the budget.
23. Can't teach an old dog new tricks.
24. Good thought, but impractical.
25. Let's give it more thought.
26. Management would never go for it.
27. Not that again!
28. Where'd you dig that one up?
29. We did alright without it.
30. That's all we can expect from them.
31. It's never been tried before.
32. Has anyone ever tried it?
33. Customers won't like it.
34. Maybe that will work in your plant, but not in mine.
35. It can't be done.
36. It won't pay for itself.
37. I know a fellow who tried it.
38. We've always done it this way.
39. You're never satisfied, are you?
40. It's impossible.

Before you go any further, why don't you examine your own thinking, and make sure you don't have a "closed mind"?

EVENTS

APRIL

9. *Telemarketing - The Key To Maximizing Your Sales Efforts, Chicago, IL. Contact NPTA.*

10. *Telemarketing - The Key To Maximizing Your Sales Efforts, Minneapolis, MN. Contact NPTA.*

11. *Telemarketing - The Key To Maximizing Your Sales Efforts, Kansas City, MO. Contact NPTA.*

13-20. *Print '85 sponsored by NAPL, NPES and PIA, Exhibition will be held at McCormick Place, Chicago, IL. For more information contact Graphic Arts Show Company, (703) 734-8285.*

18. *Marketing Value Added Services, San Antonio, TX. Contact NPTA.*

25-27. *Convention/Fiesta sponsored by the Southwestern Paper Merchants and Suppliers Association, San Antonio Marriott Hotel on the Riverwalk. For more information call (512) 452-4571.*

29. *Telemarketing - The Key To Maximizing Your Sales Efforts, Seattle, WA. Contact NPTA.*

30. *Telemarketing - The Key To Maximizing Your Sales Efforts, San Francisco, CA. Contact NPTA.*

MAY

1. *Telemarketing - The Key To Maximizing Your Sales Efforts, Los Angeles, CA. Contact NPTA.*

1-2. *First International Symposium on Competing in the Business Papers Market of the Future by* **Pulp & Paper** *magazine and Gorham International, Inc., Waldorf-Astoria Hotel, New York, NY. For more information contact David R. Allan (212) 683-9294.*

5-10. *Paper Distribution Management Development Program, Miami University, Oxford, OH. Contact NPTA.*

14-15. *Sales Development Conference, Atlanta, GA. Contact NPTA.*

29-30. *Successful Inventory Management For The Wholesale Paper Distributor, Chicago, IL. Contact NPTA.*

Professional Selling Skills

NPTA offers member firms an excellent on-site training program developed by Xerox Learning Systems and customized for the industry by the Association. Over 3,000 paper merchant salespeople have profited by this program to date.

For more information on this and other training programs offered by NPTA, contact the Education and Training Department at (516) 829-3070, or write: Bruce Linden, director, Education and Training Department, NPTA, 111 Great Neck Road, Great Neck, N.Y. 11021.

YOU KNOW IT'S GOING TO BE A BAD DAY WHEN...

- *Your smallest customer calls at 8:00 A.M. to tell you he received those 3 carloads of paper you shipped, unfortunately he only ordered 3 cartons.*
- *Your best salesperson arrives for work and announces she's pregnant.*
- *You make your first service call on that new computer you had installed and the recording tells you the company's number has been disconnected.*
- *On your drive to work you notice smoke rising from the direction of your warehouse.*
- *You read about a job opening in the paper and it turns out to be for your job.*
- *You get a call from the headquarters office about borrowing one of your trucks—the truck that went into Lake Michigan that morning.*
- *Your warehouse supervisor tells you that the new order picker hasn't been seen in 3 days and he's afraid that he's lost somewhere in the building.*
- *You find out that your new sales trainee is wanted on 3 continents.*
- *The new sales tiger you stole from your competitor has just announced his resignation.*
- *Your receptionist just came down with lock-jaw.*
- *You compliment the warehouse staff on the shiny floor only to find out that what's making the floor glow is 3 inches of standing water from the burst pipes.*

BOSS IS GENERALLY TO BLAME FOR EMPLOYEE FEUDS

The cause for a breakdown in communication between two subordinates because of a feud can generally be laid at the boss's door, reports Theodore Caplow in his book **Managing an Organization**. *Often, the people who refuse to communicate have substantial differences of interest imposed on them by their positions. Neither one can give in without jeopardizing his or her own interests. This situation often happens because the boss failed to specify which path to follow.*

BACK INJURIES ARE A PAIN IN THE...

According to the National Safety Council, at least 25 percent of all work-related injuries involved overexertion associated with manual material handling tasks. This percentage translates into 12 million lost work days annually, over 1 billion dollars in compensation costs. Marsh and McLennan, Inc. report that back injury claims represent 35 percent of the total workers' compensation claims paid out.

OSHA RULES TO AFFECT MERCHANTS

The Federal government and the states are all rushing to put in place rules to protect workers from exposure to hazardous substances, reports the National Association of Wholesale-Distributors (NAW).

At the federal level, OSHA promulgated rules regarding hazardous substances in the workplace in November, 1983. The OSHA hazard communication standard affects chemical manufacturers, importers and distributors.

Under the standard, manufacturers and importers of chemicals must, by November 25, 1985, evaluate their products to determine if they are hazardous. If such a determination is positive, they must provide information to their employees of the hazard by means of a hazard communications program including labels, material safety data sheets, training and access to records.

Distributors of such chemicals are required to ensure that containers they distribute are properly labeled and that a material safety data sheet is provided to their customers.

Many states and some cities decided not to wait for the federal government's timetable of events and, in many cases, decided that the federal coverage was not broad enough. Thus, they have enacted their own "employee right to know laws," many of which apply to a broader range of "employers" than the federal standard and are already to effect, and created a hodgepodge of regulatory enactments designed to protect the worker in the workplace.

Federal Preemption

The OSHA standard is supposed to preempt all state and local rules. Whether the preemption will stand up to legal challenges remains to be seen although it did in a recent New Jersey case.

In April of 1984, OSHA transmitted a federal program change to the states in which it acknowledged that many states had adopted "employee right to know laws." At the same time, OSHA expressed its position that the federal standard preempts state requirements except in approved-plan states. For laws already in effect in approved-plan states, OSHA reserved the right to examine such laws and to issue approval where such laws are at least as effective as the new federal standard. An approved-plan state is one that has adopted a plan for administration of a state workplace safety program that has been approved by OSHA.

Employee right to know laws: a hodgepodge of state and federal enactments.

Approved-plan states that have already adopted "employee right to know" regulations include Alaska, California, Connecticut, Maryland, Michigan and Minnesota. These regulations will have to be submitted to OSHA for approval to avoid federal preemption.

With respect to non-plan states that have enacted "employee right to know" laws, OSHA takes the position that their regulations preempt such laws although it acknowledges that this is a complex legal issue which will ultimately be resolved by the courts.

Non-plan states that have enacted such laws include Delaware, Florida, Illinois, Maine, Massachusetts, New Hampshire, New Jersey, New York, Rhode Island, West Virginia and Wisconsin.

State Enactments

The laws and regulations impelementing such laws vary from state to state. Generally, the state laws provide for earlier effective dates and broader coverage than does the federal standard. Until the legal issue of preemption is disposed by the courts, employers should be certain to observe compliance with both federal and state laws on the subject.

The state "employee right to know" laws are based upon the finding that there may exist a danger to the health of employees from significant exposure to certain hazardous substances. The recent asbestos cases provided the greatest impetus for state actions in this regard. Generally, the laws take the position that employees are in the best position to be aware of the symptoms of toxicity if they know what substances they are working with and, once such symptoms are manifested, employees have the inherent right to know the need for and type of corrective action that becomes necessary due to such exposure.

Scope and Requirements of State Enactments

State definitions of "employer," as noted above, usually cover a wider scope than the present OSHA standard which covers only employers in the chemical field at present and extends to other manufacturers later. Manufacturers, importers, *wholesale-distributors*, and retail and service establishments are included in many of the state laws.

As a general rule, the state law requires an employer to submit material data sheet information to a state department administering the law for all substances that have been declared or can be considered to be hazardous. Employers must also: post notices to their employees informing them of their legal rights under such "employee right to know" laws; provide labels which identify such hazardous substances and containing operating instructions; and utilize warnings in the workplace.

Employers must further keep and make available to employees, for extended periods of time, material safety data sheets for each hazardous substance to which the employees may be exposed. Education and training of employees as to proper use, dangers of exposure and procedures for corrective action upon such exposure where necessary are also required by the various state laws.

Suppliers of hazardous substances must provide the purchaser with a material safety data sheet and must assure proper labeling of the contained product. Penalties include fines and, in some cases, jail sentences for non-compliance with the law.

The foregoing is a broad overview of the various state laws covering workplace disclosures of exposure to hazardous substances. All employers should refer to the particular law of the state within which they operate to determine particular applicable rules. In addition, the federal rules as enunciated by OSHA must also be followed.

PAPER MERCHANT SALES REPORT

NPTA Regions	Sales Per Selling Day January 1985 - Compared To - January 1984	Sales Per Selling Day January 1985 - Compared To - December 1984	Sales Per Selling Day 1985 Year-to-Date - Compared To - 1984 Year-to-Date	Days Outstanding (Accounts and Notes) At Close of January 1984	1985	Calendar Days' Cost* of Ending December Inventory 1983	1984
INDUSTRIAL							
1	+17.5	-11.7	+17.5	42	44	–	–
2	+ 2.4	-14.4	+ 2.4	38	38	55	55
3	+ 3.6	- 6.1	+ 3.6	37	38	58	65
4	- 2.2	- 6.2	- 2.2	36	38	59	63
5	+ 3.3	-11.9	+ 3.3	35	34	62	62
6	+ 5.6	-14.2	+ 5.6	39	44	–	–
7	- 0.8	-15.0	- 0.8	38	40	–	58
NY Metro	+ 7.5	+ 3.7	+ 7.5	44	43	–	–
Chicago Metro	+ 7.7	- 7.5	+ 7.7	51	36	54	53
LA Metro	+ 5.2	+ 1.7	+ 5.2	46	50	47	47
US	**+ 3.1**	**- 8.8**	**+ 3.1**	**39**	**40**	**57**	**59**
PRINTING							
1	+15.1	- 3.5	+15.1	51	53	–	–
2	+ 7.4	- 8.6	+ 7.4	45	47	63	69
3	+ 9.0	- 5.3	+ 9.0	40	44	82	80
4	+ 9.3	+ 3.0	+ 9.3	41	45	68	76
5	+ 7.4	+ 0.5	+ 7.4	43	45	89	89
6	+ 4.0	- 2.6	+ 4.0	43	45	–	–
7	+ 4.2	- 1.7	+ 4.2	42	45	86	–
NY Metro	+11.4	- 7.1	+11.4	43	42	–	–
Chicago Metro	+13.6	- 1.0	+13.6	47	45	–	–
LA Metro	+ 9.1	+ 0.6	+ 9.1	38	46	92	94
US	**+ 8.7**	**- 2.8**	**+ 8.7**	**43**	**45**	**79**	**81**

*To calculate monthly inventory turnover, divide 365 calendar days by # of calendar days cost, e.g., 365/73 = 5.00x.

Region 1: CT, ME, MA, NH, RI & VT
Region 2: DE, DC, MD, NJ, NY & PA (excluding NY Metro)
Region 3: AL, FL, GA, NC, SC, TN & VA
Region 4: IL, IN, KY, MI, MO, OH, WV & WI (excluding Chicago Metro)
Region 5: CO, IA, KS, MN, MT, NE, ND, SD, WY
Region 6: AK, AZ, CA, HI, ID, NV, NM, OR, UT & WA (excluding LA Metro)
Region 7: AR, LA, MS, OK & TX
NY Metro: NY: New York City, Long Island and Westchester Co. NJ: Counties of Bergen, Essex, Hudson, Middlesex, Passaic and Union
Chicago Metro: IL: City of Chicago and Cook, DuPage and Lake Cos. IN: Lake Co.
LA Metro: Cities: Los Angeles, and San Diego. Counties: Los Angeles, San Diego, Orange and Ventura (and neighboring parts of Riverside and San Bernadino)

Selling Days
The actual number of days a firm was open for business or that the sales people made customer calls [calendar days less weekends (if applicable) and holidays]. By supplying selling days of each firm, the sales per selling day are standardized according to actual business conditions or company policies.

Days Outstanding
The number of days outstanding on this report are calculated by adding the current month's sales and the previous month's sales and dividing the total by the number of calendar days of the two months. The result is a figure representing average sales per calendar day.

The total figure provided for closing accounts and notes receivable is divided by the average sales per calendar day. The result is the number of days outstanding at the end of the month being prepared.

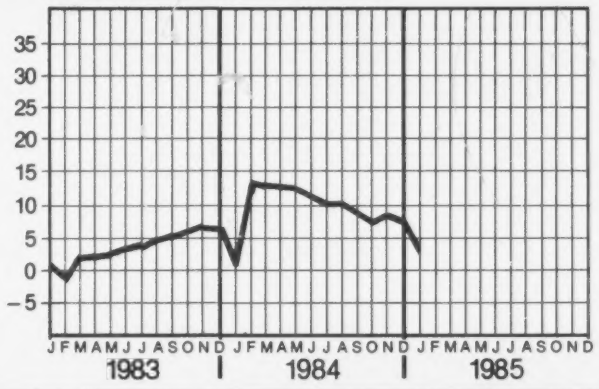
PAPER MERCHANT SALES REPORT

SUMMARY NATIONAL TREND INFORMATION: 1983 TO PRESENT

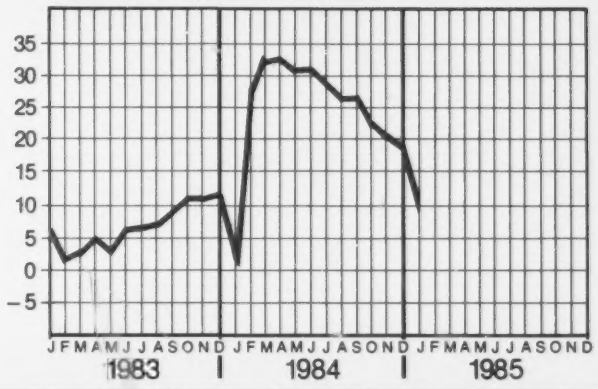
SALES INFORMATION

YEAR-TO-DATE SALES PER SELLING DAY AS A PERCENTAGE OF PREVIOUS YEAR'S YEAR-TO-DATE SALES PER SELLING DAY

INDUSTRIAL PAPER SALES NATIONALLY



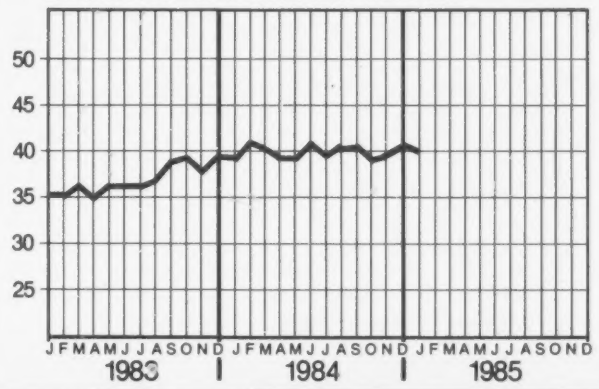
PRINTING PAPER SALES NATIONALLY



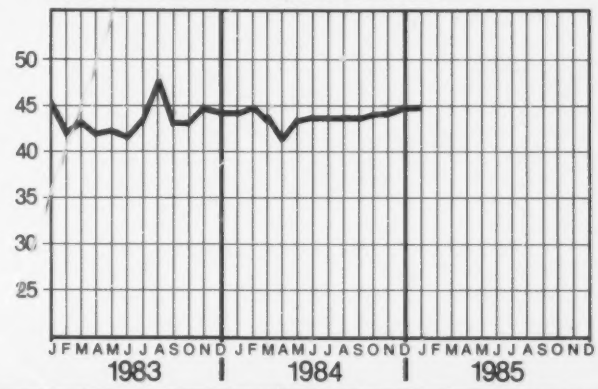
RECEIVABLES INFORMATION

DAYS OUTSTANDING—ACCOUNTS AND NOTES RECEIVABLE FROM PAPER SALES AT END OF EACH MONTH (IN CALENDAR DAYS)

INDUSTRIAL PAPER RECEIVABLES NATIONALLY



PRINTING PAPER RECEIVABLES NATIONALLY

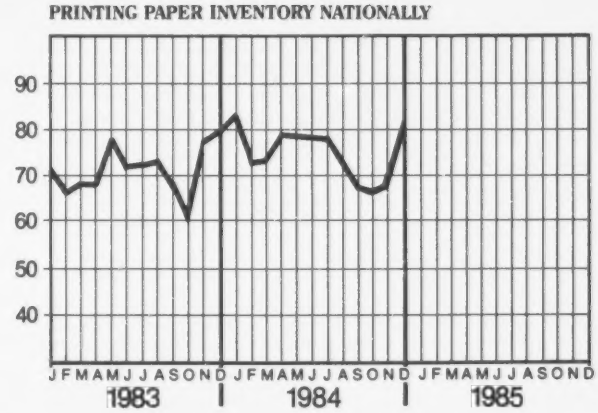


INVENTORY INFORMATION

CALENDAR DAYS COST OF ENDING MONTHLY INVENTORY (FIFO) (IN CALENDAR DAYS)

INDUSTRIAL PAPER INVENTORY NATIONALLY

PRINTING PAPER INVENTORY NATIONALLY



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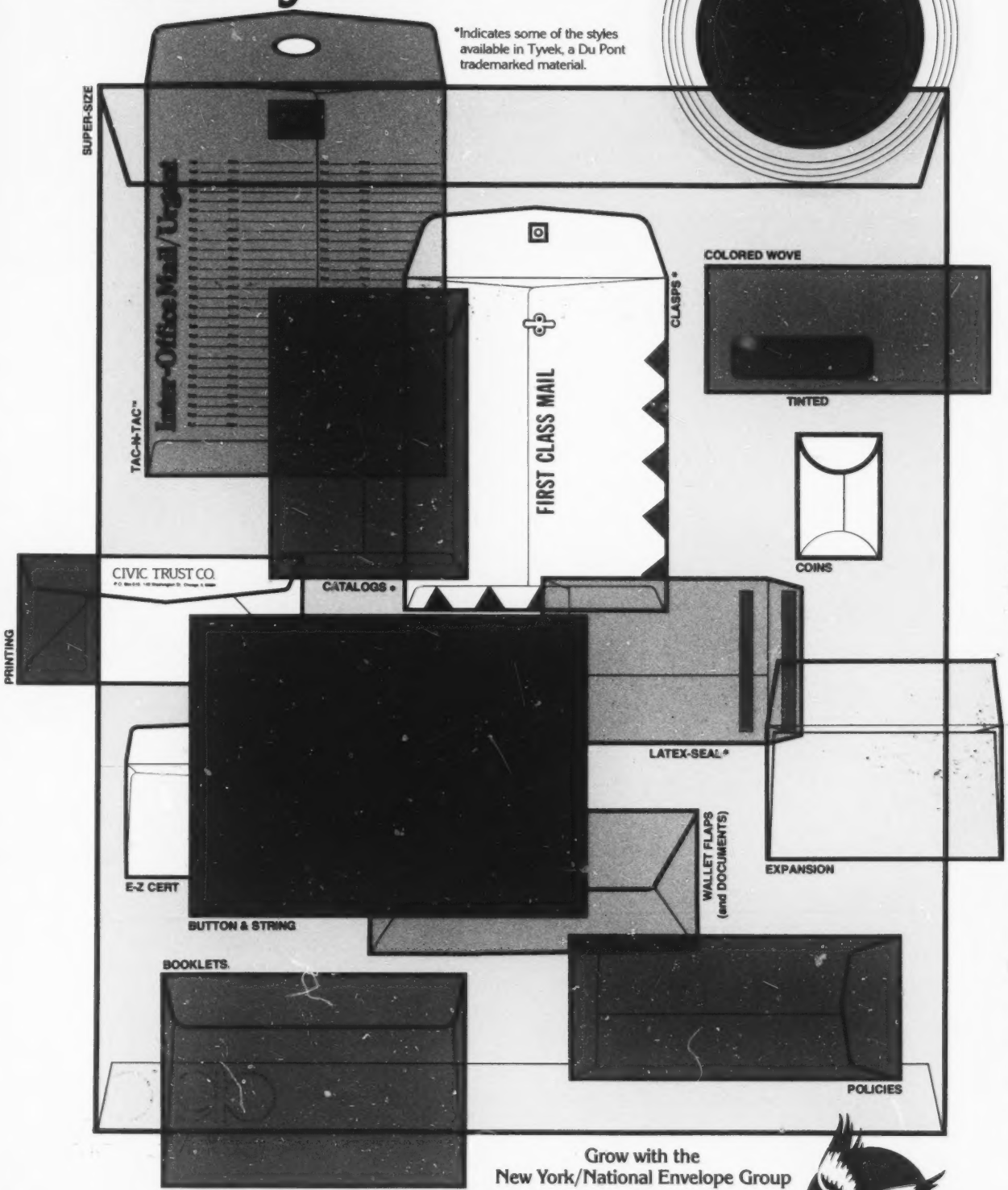
Who but National Envelope Offers so many styles, even Tyvek

*Indicates some of the styles available in Tyvek, a Du Pont trademarked material.



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